

ServiceMinder|Pay

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Overview

Did you know the average franchisee pays around 3.5% in payment processing fees, which can limit growth potential? That's why we're offering a solution to help our clients eliminate these high fees—**serviceminder|pay**. With **serviceminder|pay**, we're not just reducing costs—we're changing the way you manage payments, boosting efficiency, visibility, and profitability.

As a trusted franchise supplier for over 12 years, supporting nearly 60 brands and more than 2,500 franchisees, we've continuously tackled our clients' challenges with a comprehensive approach. Now, we're going a step further to remove another major obstacle from your brand's daily operations: the hassle of payment processing fees, visibility, and reconciliation reports from third-party gateways.

With our new solution, **serviceminder** users can benefit from:

- Get started with no commitments, payments included, and no minimums or monthly fees
- Instant approval with prefilled applications
- Direct support from the **serviceminder** client success team—no extra vendor to manage
- Faster access to your funds
- Reconciliation and reporting all in one platform
- Seamless integration with QuickBooks Online
- Instant approval and clear, transparent pricing

[Sign up for serviceminder|pay!](#)

Sign Up Process

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Steps to Sign Up

1. Navigate to **Control Panel > Integrations > Payments**.
2. Select the option to start accepting Credit Cards and eChecks.
3. In the **Payment Gateway** section, click the link to start your application.
4. **Complete the Onboarding Form.**
 - a. You'll be asked to enter:
 - i. Your **business information**: Legal name, DBA name, address, phone number
 - **EIN** (Employer Identification Number): 9 digit federal tax ID number for businesses

- **MCC Code** (Merchant Category Code): a four-digit code used by credit card companies to classify businesses based on the type of goods or services they provide. If you are part of a franchise brand, this will be pre-populated for you.
- **Average Ticket, Highest Ticket, and Monthly Payments Volume:** These fields refer to the estimated transactions you anticipate doing.

ii. **Merchant Contact information:** The point of contact in your business regarding your payment processing.

iii. **Business owner details:** name, email, phone, SSN, and ownership percentage

- Make sure to use your legal name. If you use a nickname and you have used that as your username in serviceminder, that information might auto-populate in the Name field. Double check to make sure that information matches what you have on file as the owner of your business.

iv. **Bank account details** for depositing funds

b. Some information will be pre-populated for you. This information is pulled from what you have entered in **Control Panel > General**. Please verify that all information is correct and matches your business legal entity details before proceeding.

5. Review and Sign.



When the next page loads, **stay on that page**. There will be a link that you follow to officially **submit** the application.

6. Follow the link to finish submitting your Application.

7. **Submit the Application:** Once approved, the integration is enabled automatically and you can begin accepting payments.

Migrating Card Tokens to ServiceMinder Pay

If you're switching your payment processing to **ServiceMinder Pay**, you may need to transfer existing card tokens from your current provider. The process varies depending on your current processor.

Supported Direct Transfers: TSYS & Heartland

If your current provider is **TSYS** or **Heartland**, ServiceMinder can assist with initiating the token migration process.

- **Download Existing Tokens**
 - Visit this link to download and extract current tokens using the Contact ID: [Card Tokens Report](#)
 - This ensures each token is correctly matched to the appropriate contact in your system.
- **Submit a Support Ticket**
 - Email: support@serviceminder.zendesk.com
 - Include the CSV file with token data from the report.
- **ServiceMinder Support Coordinates With Processors**
 - Our team will contact TSYS/Heartland to request the token extraction.
 - Once received, our team will submit the file for re-tokenization.

For All Other Payment Providers

If you're migrating from **Authorize.net**, **QuickBooks Payments**, or another provider, the merchant (you) must initiate the token transfer.

What You Need to Provide

Your processor should give you a file that matches our standard token import format:

Contact ID, New Profile ID, New Payment ID

Download your tokens from ServiceMinder to map them correctly to contacts.



If your file includes only old-to-new token mappings, use Excel's **VLOOKUP** to rebuild the file using your current token report to match tokens to contacts.

Token Migration Format Guide

Column Name	Description
ContactId	Our contact Id -- available from the token download you used to initiate the token transfer. If not provided, the next two columns must be present.
OldProfileId	The existing Profile Id. Both Profile and Payment fields are required if contact Id is not present. If Contact Id is included, the existing Profile/Payment Ids are ignored.
OldPaymentId	The existing Payment Id
NewProfileId	The new contents for the Profile Id field (required)
NewPaymentId	The new contents for the Payment Id field (required)
ACH	0 for card, 1 for ACH (so we know what type of token it is). If missing, we assume card.
Last4	The last 4 digits of the account number, if missing, card numbers may not display depending on the gateway, but charges should still be able to run successfully.

Column Name	Description
Expiration	The expiration date in MM/YYYY or MM/DD/YYYY format
NameOnCard	The card holder's name

Lossless Token Transfer

Lossless token transfer allows you to switch from your existing payment gateway to serviceminder|pay without losing saved payment methods or requiring customers to re-enter their card details.

This dual-path setup allows for a smooth, interruption-free transition, giving your business time to gradually shift everything to the new platform while maintaining payment continuity for existing customers.

How It Works

- When you enable serviceminder|pay, any existing payment tokens in your account are tagged as part of the old gateway
- These tokens continue to process transactions using your previous payment gateway, even after serviceminder|pay is active.
- New payment information captured after enabling serviceminder|pay will be processed through the new gateway (Forward).
- Both systems work in parallel—serviceminder|pay for new transactions, your old provider for legacy tokens.

What You Need to Do

- Keep your old gateway active to ensure existing tokens can still process payments.
- Don't delete or deactivate tokens in the serviceminder|pay system; they'll continue working as long as the old gateway account remains open.
- Over time, as customers update their card info or save new payment methods, these will automatically route through ServiceMinder Pay.

Important Caveats



- Refunds for transactions processed on the old gateway must still be handled through that provider.
- Reporting for old transactions will not appear in the serviceminder|pay dashboard, but will remain visible in your previous gateway's reporting tools.

FAQs

Q: Who handles the Token Conversion for the SM Pay Integration?

- If you're using TSYS or Heartland: ServiceMinder can handle this.
- For all others: The merchant must make the request.

Q: What is the maximum number of Token transfers that can be done at a time?

The recommended pace is 10 transfers per week.

Q: How are location tokens obtained?

- To migrate payment-on-file tokens to the new gateway, you can download and extract your current tokens

using the Contact ID via this link: serviceminder.io/reporting/custom/cardtokens

- This ensures that the new tokens can be correctly matched to the existing contacts.

Q: Can all tokens for a Brand be moved at once instead of individually?

Yes, if all the tokens are in one Token Group.

Q: Can locations in a Token Group move their tokens individually?

Yes. However, Heartland would first need to remove the tokens for that MID from the Token Group before transferring the individual tokens.
